Field Guide to Searching the Live Manual

Instructor Lesson Plan

Time Required: 1 Hour

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| Lesson Description | |
| The information below provides the instructor with an overview of the lesson and the materials that are required to effectively present this instruction. | |
| TMS # | 4189415 |
| Prerequisites | There are no prerequisites for this course. |
| target audience | The target audience for **Field Guide to Searching the Live Manual** is all Veterans Service Center employees. |
| Time Required | 1 hour |
| Materials/ TRAINING AIDS | Lesson materials:   * Field Guide to Searching the Live Manual PowerPoint Presentation * Field Guide to Searching the Live Manual Trainee Handouts * Field Guide to Searching the Live Manual Answer Key |
| Training Area/Tools | The following are required to ensure the trainees are able to meet the lesson objectives:   * Classroom or private area suitable for participatory discussions * Seating, writing materials, and writing surfaces for trainee note taking and participation * Handouts, which include a practical exercise * Large writing surface (easel pad, chalkboard, dry erase board, overhead projector, etc.) with appropriate writing materials * Computer with PowerPoint software to present the lesson material   Trainees require access to the following tools:   * VA TMS to complete the assessment * VA CPKM access to complete the exercise |
| Pre-Planning | * Become familiar with all training materials by reading the Instructor Lesson Plan while simultaneously reviewing the corresponding PowerPoint slides. This will provide you the opportunity to see the connection between the Lesson Plan and the slides, which will allow for a more structured presentation during the training session. * Become familiar with the content of the trainee handouts and their association to the Lesson Plan. * Practice is the best guarantee of providing a quality presentation. At a minimum, do a complete walkthrough of the presentation to practice coordination between this Lesson Plan, the trainee handouts, and the PowerPoint slides and ensure your timing is on track with the length of the lesson. * Ensure that there are copies of all handouts before the training session. * When required, reserve the training room. * Arrange for equipment such as flip charts, an overhead projector, and any other equipment (as needed). * Talk to people in your office who are most familiar with this topic to collect experiences that you can include as examples in the lesson. * This lesson plan belongs to you. Feel free to highlight headings, key phrases, or other information to help the instruction flow smoothly. Feel free to add any notes or information that you need in the margins. |
| Training Day | * Arrive as early as possible to ensure access to the facility and computers. * Become familiar with the location of restrooms and other facilities that the trainees will require. * Test the computer and projector to ensure they are working properly. * Before class begins, open the PowerPoint presentation to the first slide. This will help to ensure the presentation is functioning properly. * Make sure that a whiteboard or flip chart and the associated markers are available. * The instructor completes a roll call attendance sheet or provides a sign-in sheet to the students. The attendance records are forwarded to the Regional Office Training Managers. |

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| Introduction to Field Guide to Using the Live Manual | | |
| INSTRUCTOR INTRODUCTION | | Complete the following:   * Introduce yourself * Orient learners to the facilities * Ensure that all learners have the required handouts |
| time required | | .05 hours |
| Purpose of Lesson  Explain the following: | | This lesson is intended to familiarize employees with the tools in the Live Manual and how to effectively search for references in order to more accurately and efficiently process claims. This lesson will contain discussions and exercises that will allow you to gain a better understanding of:   * Live Manual * Metadata * Searches * Tracking changes |
| Lesson Objectives  Discuss the following:  Slide 2  Handout 2 | In order to accomplish the purpose of this lesson, the Veterans Service Center employee will be required to accomplish the following lesson objectives.  TheVeterans Service Center employee will be able to:   * List characteristics of Live Manual. * Define metadata and Microsoft Internet Explorer functions. * Locate the suggestion link for the Live Manual. * Identify effective search strategies. * Explain how to find a list of changes by date, change date, and audience. * Demonstrate use of the manual for research. | |
| Explain the following: | Each learning objective is covered in the associated topic. At the conclusion of the lesson, the learning objectives will be reviewed. | |
| Motivation | The Live Manual housed on the Knowledge Management (KM) portal is the single source for reference materials and guidance. Knowing how to use this tool effectively saves employees time and allows for more accurate claims processing. Getting it right the first time saves us time and creates a better relationship with our stakeholders. | |
| STAR Error code(s) | Could impact all types of errors. | |
| References  Slide 3, Handout 2 | Explain where these references are located in the workplace.  All M21-1 references are found in the [Live Manual site](https://vaww.compensation.pension.km.va.gov/). | |

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| Topic 1: Introduction to the Live Manual | |
| Introduction | This topic will allow the trainee to better understand the Live Manual and the time savings proper use will create. |
| time required | .2 hours |
| OBJECTIVES/ Teaching Points | Topic objectives:   * List characteristics of the Live Manual |
| What Is It? *Slide 4 Handout 2* | * Live Manual (housed on the Knowledge Management (KM) portal * Officially launched April 15, 2015 * Evaluation and integration of more than 4,500 individual pieces of published guidance * Thorough review of approximately 6,000 pages of existing M21-1 guidance * Ongoing updates |
| What have employees been asking for? *Slide 5 Handout 2*  *Explain the following:* | Everything in one searchable location, so they don’t have to go to a fast letter (FL), training letter (TL), Veterans Service Center Manager (VSCM) Bulletin, or Quality Call note… Now we have it!  *This recommendation has been coming from the field for years, and it took a lot of work, but now it’s here!* |
| Time We’ll Keep Investing *Slide 6 Handout 2*  *Explain the following:* | * Calendar notifications * Reading updates   *We’ll still have to read the updates. Laws will still change, clarification will still come out, but this is nothing new, VA employees have always done this.*  *As an easy tracking mechanism, we are also able to receive calendar updates to let us know what we need to check out for changes.* |
| Time Saved *Slide 7 Handout 2*  *Explain the following:* | * Changes are all tracked and available by date * One source   + no scavenger hunt through FLs, TLs, VSCM calls, email guidance, Frequently Asked Questions (FAQs), etc.   + No need to remember where you saw that one thing you think you remember…   + Easily searchable * ***Correct info… less rework!***   ***Talking point****: we still have to put in the work of reading the info,* ***but*** *now we don’t have to put so much work into tracking it down and trying to figure out if/when there was a change or where that change was located or if the multiple references agree or what to do if they don’t agree...* |

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| Topic 2: Searches | |
| Introduction | This topic will allow the trainee to better understand how searches work and how to retrieve the data they want. |
| time required | .25 hours |
| OBJECTIVES/ Teaching Points | Topic objectives:   * Define metadata and Microsoft Internet Explorer functions * Locate the suggestion link for the Live Manual * Identify effective search strategies |
| Internet Explorer Tabs and Use *Slide 8* | If you want to preserve what you’re looking at ***and*** check out a link referenced in the section you’re reading, open a new tab for the referenced link.  ***Talking point****: there are a few different ways to do this. For example, you can open a tab and copy paste the link into the URL or you can open a separate tab and then follow the citation to the block you see in the reference.* |
| What is metadata? *Slide 9 Handout 2* | Metadata is literally data about data. So… it makes your search term pull up the right article! The Live Manual employees are adding new metadata all the time to make our searches easier and more effective.  They take suggestions too!  *Talking point: they don’t read minds though, and when you’re processing a case, you may be searching differently than they would, so… take the time and suggest metadata tags if they’re needed!* |
| How do I make a suggestion or provide feedback?  Slides 10 - 11 Handout 2  Explain the following: | Screenshots shown on PowerPoint…  On the KM home page, click on “We want to hear from you…” link.  This will take you to information about submitting feedback and a link to the VA Pulse page where the team collects and responds to feedback about the Live Manual.   * Be very specific with your feedback * include specific M21-1 citation (Part, Subpart, Chapter, Section, Topic, and Block), * a description of the issue/problem, and * suggestions for how we can fix the identified problem). * Review past comments and feedback on the site as your question may have already been asked.   ***Note****: there are some things that have been looked at but cannot be changed due to system limitations. For example, hyperlinks are only able to go to the section level, they can not go to each specific block.*  *Often, it pays off to see if somebody else has already asked your questions, so you don’t have to wait for a response. This also frees up the M21-1 employees to provide quick answers to the new inquiries.* *Also, the order of the entries in the “attachments” at the bottom of the article cannot be changed. KM automatically posts the newest thing at the bottom; there’s no way to change that, so users will always need to look at the bottom of the list of attachments to find the most recent Key Changes document.* |
| Suggestions with No VA Pulse  *Slides 12 - 13* | * Still click on “We want to hear from you” link on KM home page * Select drop down box “suggestions” * Select “make a suggestion” * Fill out the form with your information |
| Search terms *Slide 14 Handout 2* | * Use terms that are * specific (relate to your actual topic) * sensitive (aren’t included in every topic like “rating” or “decision”), and * unique, if possible. * Don’t use a long phrase because that will pull up many topics unrelated to your search. |
| Can’t find it? *Slide 15 Handout 2*  *Explain the following:* | * Consider using a Boolean search * Try alternate wording   + Example: use future exam vs. reexamination     - Future exam brings up relevant references; reexamination brings up odds and ends   + Example: TDIU, IU, or Individual Unemployability?     - All of these terms pull up good, specific references   *Take the time to go to the “We want to hear from you” link on the CPKM homepage. State specifically what term you think should pull up what article. For example, if you think that any of the terms asthma, shortness of breath, or lung should pull up the respiratory reference, M21-1, Part III.iv.4.D, then take the extra 3 minutes or so to submit the suggestion, so future searches for you and all your co-workers will only take 15 seconds.*  ***Helpful hints****:*  *1. Talk about the fact that you can select a section from the Browse button on KM (such as M21-1, FL, FAQ, etc., then you can search in the lower/secondary search box in just that area of the KM.*  *2. You could also type a search term in the “Search Knowledge Base” bar next to the “Browse Topics” button, then a “Refine Your Search” menu comes up on the left. You can narrow your search using content type (Policy/Procedures, Rescinded, Training, etc.), or Special Benefit Group, Target Audience, or Process Stage.* |
| Boolean (Quote Mark) Searches *Slide 16 Handout 2* | This allows you to drill down to exactly what you’re looking for. Examples of great times to use Boolean searches:   * You have the M21-1 citation - “I.5.E.1.a” * You have a specific search term – “SMC” |
| Still Can’t Find It? Cross-reference! *Slide 17 Handout 2*  *Explain the following:* | If you just can’t find what you’re looking for, don’t forget that you can go to the reference sections of training on that topic.  It’s a great place to get M21-1 citations that you can go directly to (unless you were looking forward to reading the full manual in all its glory ☺).  *If we all take time to make metadata suggestions, our searches will get easier and easier. The CPKM team is very responsive, and updates are quickly done. This will also make it easier to find references when you’re taking those certification tests every couple of years.* |
| Topic 3: Changes | |
| Introduction | This topic will allow the trainee to understand where to find changes, dates of changes, and target audience for the updated guidance. |
| time required | .25 hours |
| OBJECTIVES/ Teaching Points | Topic objectives:   * Explain how to find a list of changes by date, change date, and audience * Demonstrate use of the manual for research |

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| What Changed?  When?  Is it relevant to me?  Slides 18 - 21 Handout 3 | (See screenshots in PowerPoint)   * **Log in** to the Live Manual * Click Browse Topics * Click VA Key Changes * Click on year folder * Click hyperlink to month or scroll to changes or use CTRL+F and search for your keyword(s) * Change dates listed in left column * Changes listed newest to oldest due to requests from the field * Target audience listed on right * Always a good idea to look at change description to see if you might need to take a closer read |
| Is there a backup? Yes! *Slide 22 Handout 3* | If you are having issues accessing the Live Manual, KnowVA can be accessed by any one through [www.knowva.ebenefits.va.gov](http://www.knowva.ebenefits.va.gov/).  Knowledge VA, or KnowVA, is an external-facing Web platform that provides Veterans, their families, survivors, and Veteran advocates with access to the same information claims processors use to process and make decisions on benefit claims.  *Talking point: emphasize that KnowVA is a mirror image of a portion of the internal content and it’s updated concurrently with internal updates. Not everything available internally is accessible via KnowVA, but what is there is identical to the internal content and is updated concurrently with the Live Manual.* |
| Additional Resources *Slide 21*  Explain the following: | Don’t forget these CPKM/Living Manual resources already provided by the Collaboration Strategies Team:   * <https://www.vapulse.net/docs/DOC-20438> - FAQs on training * <https://www.vapulse.net/docs/DOC-20574> - Video of training * You tube: <https://www.youtube.com/watch?v=xHpBxpc4XqQ>   *The CPKM/Live Manual Training links above include helpful information about system limitations and what the team has already done to make this a useful tool. It’s also worth investing the 8 minutes, if you haven’t already, to check out the helpful hints put out in this training which can be viewed through the VA pulse or You Tube.* |
| DEMONSTRATION  *Slide 22* | Demonstrate finding the following items in the Live Manual for the class. Add additional items as needed - is there something people have been struggling to find? Take a look as a class at how to get to that reference and/or how to suggest additional metadata for that reference. (See PowerPoint for instructions if needed).   * How to find the changes by date page, change date, and target audience * How to find the feedback/suggestion link * How to use a Boolean search * "IV.ii.2.H.11" (SMC) * "III.iv.3.D.2.i" (Examination Reports) * Additional examples * How to use search terms to pull up a reference * IU, TDIU, and Individual Unemployability * Tinnitus * Hearing loss (note: many references have been recended), so it’s important to search through links that appear * Veteran status * Illustrate how different terms may have different results * Reexamination * Future exam |
| Regional Office Specific Topics | **This row should be included ONLY in the last topic before the Practical Exercise.**  At this time add any information pertaining to:   * Station quality issues with this lesson * Additional State specific programs/guidance on this lesson |

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| Practical Exercise | | |
| Time Required | | .25 hours |
| EXERCISE | | Give students 10 minutes to go through scavenger hunt. Ask class if there was trouble finding any particular item. Were some things easier to find using search terms vs. Boolean searches?  Ask if there are any questions about the information presented in the exercise, and then proceed to the Review. |
| Lesson Review, Assessment, and Wrap-up | | |
| Introduction  Discuss the following: | The Field Guide to Searching the Live Manual lesson is complete.  Review each lesson objective and ask the trainees for any questions or comments. | |
| Lesson Objectives | You have completed the Field Guide to Searching the Live Manual lesson.  The trainee should be able to:   * List characteristics of Live Manual. * Define metadata and Microsoft Internet Explorer functions. * Locate the suggestion link for the Live Manual. * Identify effective search strategies. * Explain how to find a list of changes by date, change date, and audience. * Demonstrate use of the manual for research. | |
| Assessment | Remind the trainees to complete the on-line assessment in TMS to receive credit for completion of the course.  The assessment will allow the participants to demonstrate their understanding of the information presented in this lesson. | |